

Sample Email for directing employees & advisors to planwithease

Subject: Accessing 403b assets

Attachment: [Access 403b assets](#)

Message: A participant, or an advisor on behalf of a participant, may request employer/plan sponsor approval of 403b transaction requests online at www.planwithease.com. Attached are step by step, illustrated instructions on how to use the system.

You can view a demonstration of how to log in for the first time [here](#). There is additional information on this site about how to use planwithease. You may also call planwithease at 855-464-6928 for help with the online system.